CUSTOMIZING A LIMIT BOX

- You can place limits in two locations:
1. Query section limit
2. Results section limit

1. The query section allows you to manipulate the data before it is downloaded onto your computer. This is necessary since no personal computer can handle the amount of data sent by the Financial Data Warehouse without some limits. You will crash your machine without limits in this section and slow down the mainframe and take up space on the server.

2. The Results section allows you to place individual limits to the data that has already come from the Financial Data Warehouse. For example you already pulled a detail report for all of program code 523403030. You are then asked to only show BOC 2100, 2500, and 2613. You would not have to run the report again just place a limit to only view the data you need.
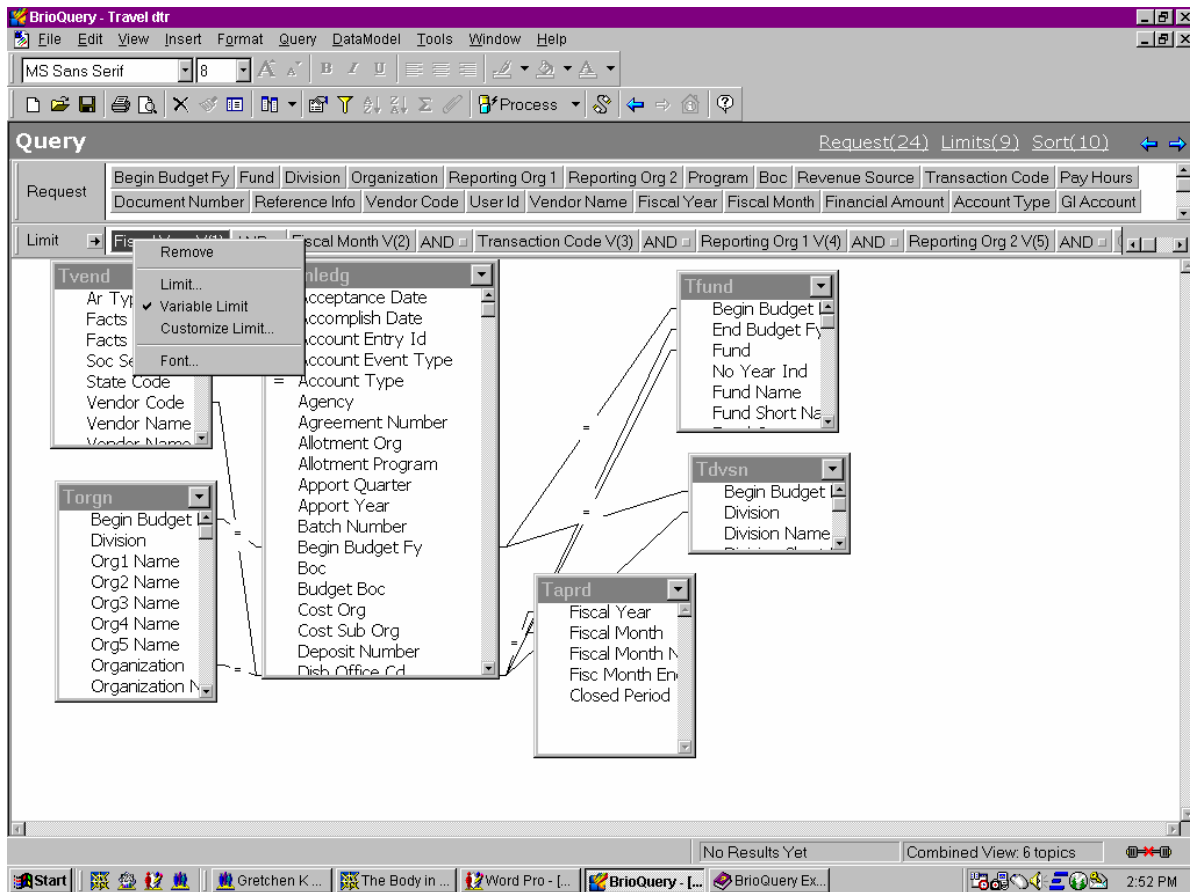
Customization of the limit box in the query section:

Step 1:
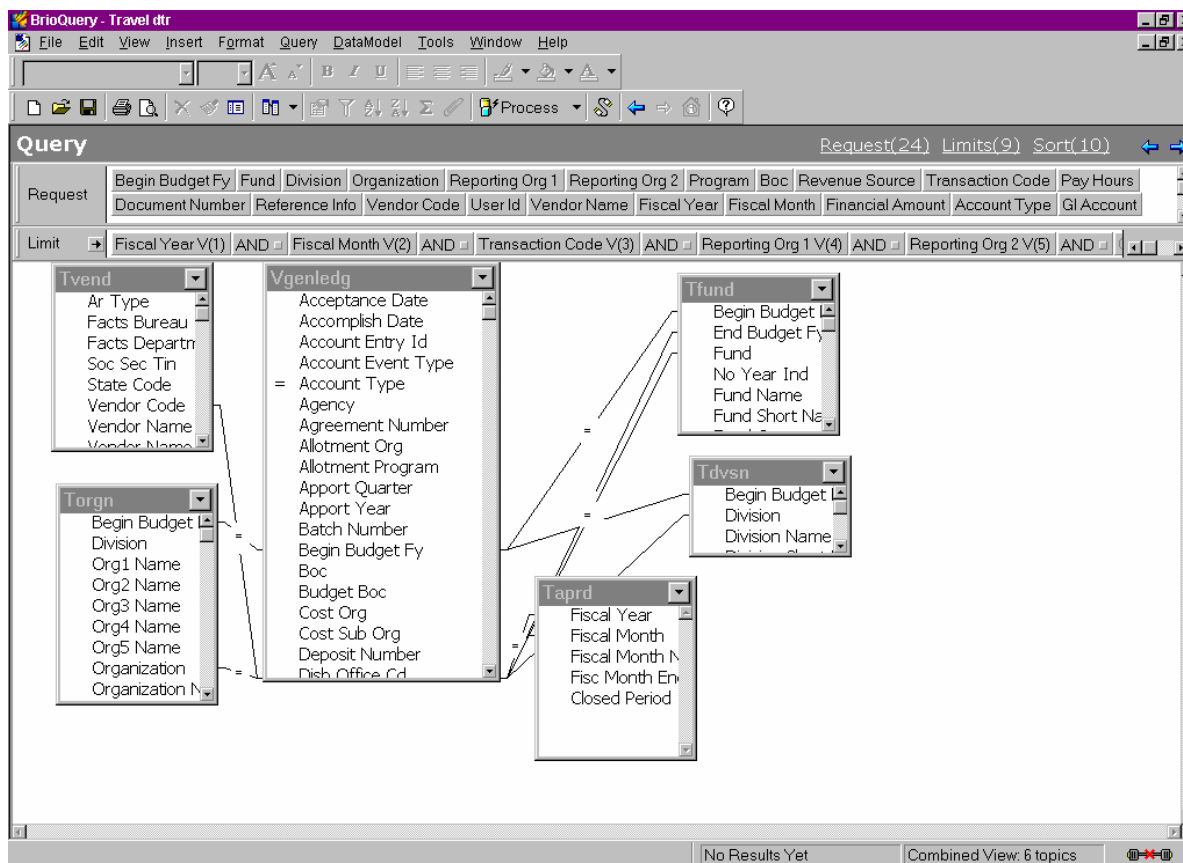
1. Make sure you are in the **Query section** and that you can view your limit line. In this example the limit line is in the second position.

Step 2:

2. Left <**click**> on a limit to highlight the limit. Then right <**click**> on the limit to view a quick view menu. You have 5 choices Remove, Limit, Variable Limit, Customize Limit and Font.

- Limit allows you to see the limit and choose the information for a query. This selection is helpful when it is not a variable limit and you want to change the options.
- Variable Limit, if the limit is checked means that a person has a choice in what they are picking. For example you can either choose FY 2000, FY 2001 or FY 2002 etc.. If this option is not clicked the user can only receive information that an explorer user has already chosen. You want this marked for any limit which allows you to choose org codes or BOC.

Note: There are some limits which shouldn't have be variable such as limits for general ledger entries. You have chosen the entries necessary for this report and verified it. Any change to a general ledger entry could cause the report to be unusable and inaccurate.

- The next section is dealing with the Customization of the Limit.

Customize Limit

**Step 3:** <**Click**> on customize limit option.

Step 4:

4. The Customize Limit box displays the title, Prompt, Values and Options. You can now change the title to be easier to understand by users and change the prompt to allow an explicit message on what the user should be putting in at this limit box.

- Custom SQL, Name Editor, Advanced Button and Nulls Check box should be unchecked from the query. These options are rarely needed and Brio Help will explain these in more depth. Advanced Button always should be unchecked. This box can cause major problems for a user if they choose this box.
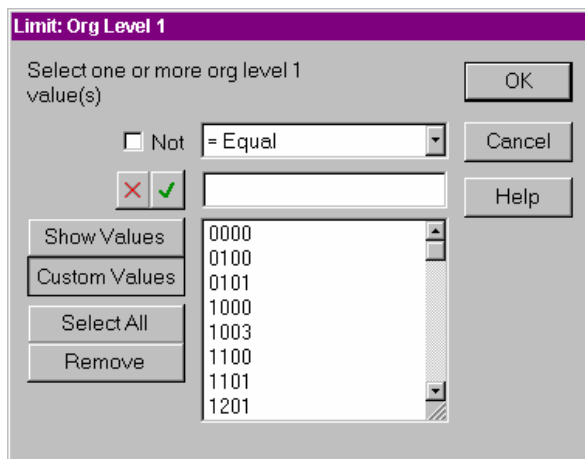
A. Custom Values Only:

A.

A. Custom Values allows the user to enter their own data into the system. It is the quickest method since you can have entered data most people use and then when they run the query the process takes a few seconds instead of minutes to bring up the data. Custom values also allow users to data enter their own information.

B. Show Values Only:
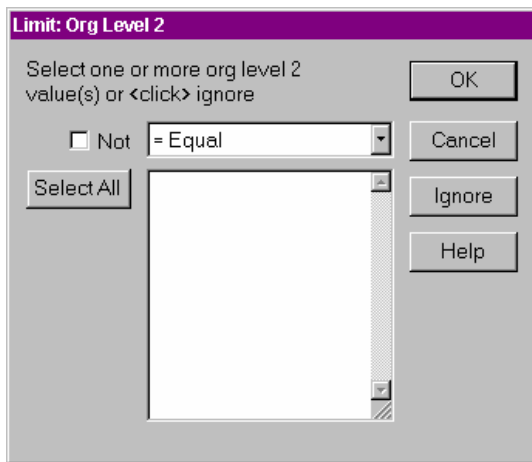
B. Show Values checks the database to find all information which meets the requirements for the query. When you have selected prior limits, sometimes with those limits Show values will be blank.

C. Both Show Values and Custom Values Checked:

C. This option gives the user the most options. Usually set up a list of choices by <**clicking**> **Show Values**, **Select All** and then **Transfer** which transfers all the information to the **Custom Values** option. You can leave the limit on Custom Values which will then contain data and also allows the user to quickly receive a group of choices.